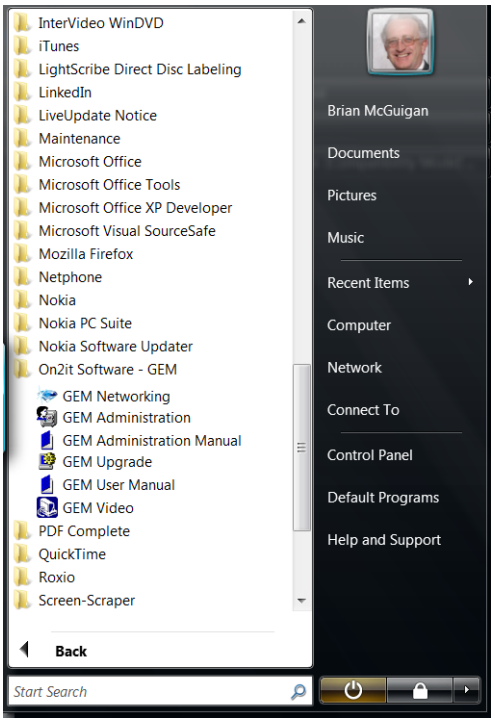
GETTING USED TO THE USER INTERFACE

This brief introduction is designed to familiarise you with the GEM User Interface and get you used to the range of Forms it uses.

This is not intended to be a substitute for the User Manual, accessible through the Start Menu, or on-line help system that you can always get by pressing F1.

Windows Start Menu

The **On2it Software – GEM** options on the Start Menu, shown here in Windows Vista, are:



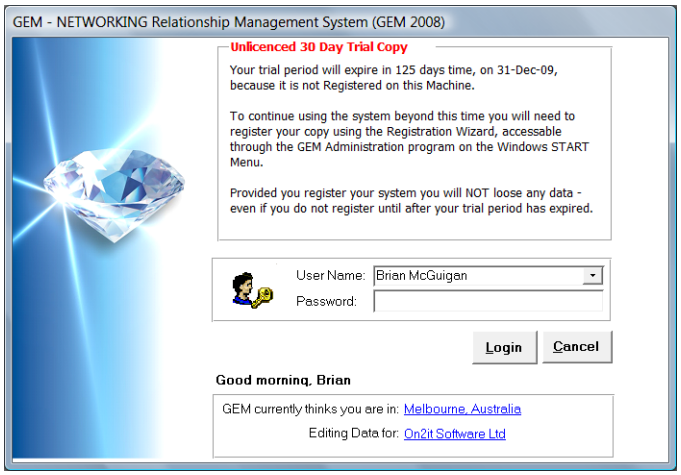
- **GEM Networking** This is the main program that you will use on a daily basis.
  (This appears as 'Relationship GEM' at present.)
- **GEM Administration** contains all the administrative functions that you will use only occasionally.
- **GEM Administration Manual** contains the details of how to use the GEM Administration Program.
- **GEM Upgrade** is used to upgrade your system to the latest version, whenever you receive an upgrade patch.
- **GEM User Manual** contains the details of how to use the main program.
- **GEM Video** enables you to watch a Video giving you an overview of the system. You are strongly recommended to watch this or read the 'System Overview' in the User Manual before using GEM.

The Login Screen

When the system first opens it displays:

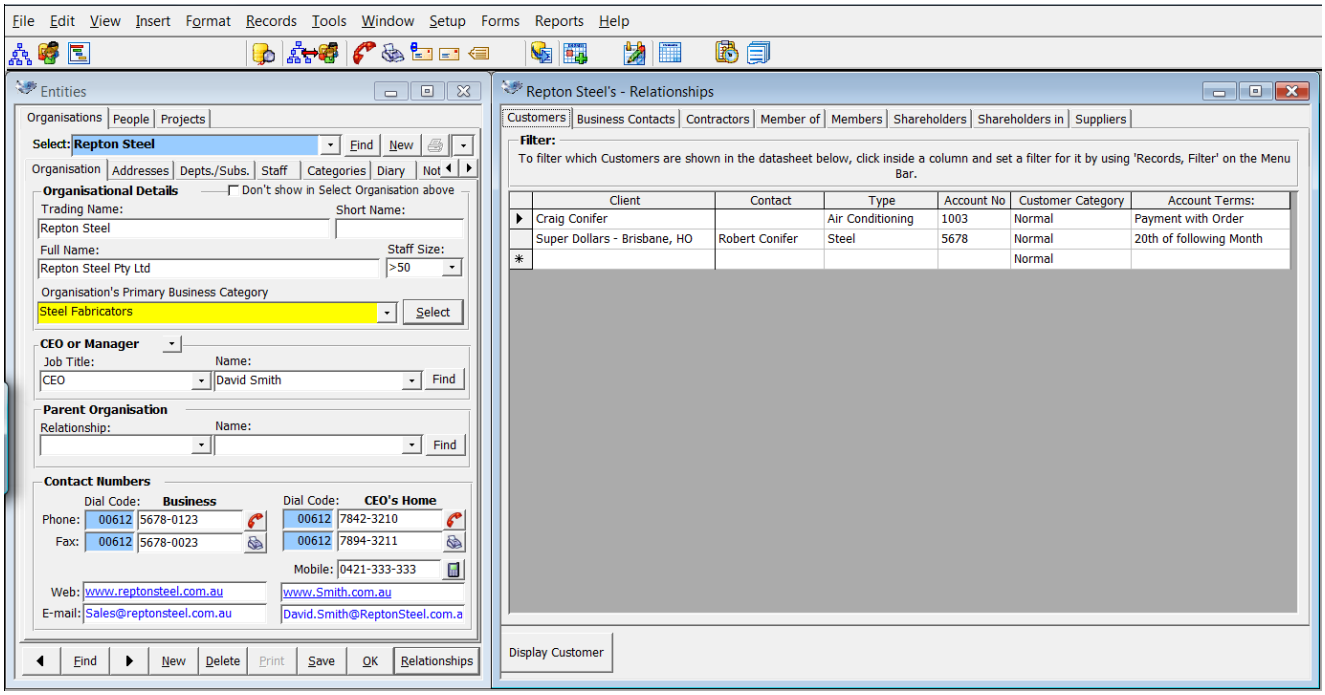
This warns you when your 30 Day Trial will expire. It also allows you to tell the system where you are so that it can display the correct dial codes to everywhere else.

You only ever need to specify local phone numbers in GEM as it already knows the dial codes to nearly everywhere in the World. If it doesn't, it will prompt you for them.


GEM - NETWORKING Relationship Management System (GEM 2008)
Unlicenced 30 Day Trial Copy
Your trial period will expire in 125 days time, on 31-Dec-09, because it is not Registered on this Machine.
To continue using the system beyond this time you will need to register your copy using the Registration Wizard, accessable through the GEM Administration program on the Windows START Menu.
Provided you register your system you will NOT loose any data - even if you do not register until after your trial period has expired.
User Name: Brian McGuigan
Password:
Login
Cancel
Good morning, Brian
GEM currently thinks you are in: Melbourne, Australia
Editing Data for: On2it Software Ltd

Initial Display

Once you have logged in you will see:


File Edit View Insert Format Records Tools Window Setup Forms Reports Help
Entities
Organisations People Projects
Select: Repton Steel
Find New
Organisation Addresses Depts./Subs. Staff Categories Diary
Organisational Details
Trading Name: Repton Steel
Short Name:
Full Name: Repton Steel Pty Ltd
Staff Size: >50
Organisation's Primary Business Category
Steel Fabricators
Select
CEO or Manager
Job Title: CEO
Name: David Smith
Find
Parent Organisation
Relationship:
Name:
Contact Numbers
Dial Code: Business
Dial Code: CEO's Home
Phone: 00612 5678-0123
00612 7842-3210
Fax: 00612 5678-0023
00612 7894-3211
Mobile: 0421-333-333
Web: www.reptonsteel.com.au
www.Smith.com.au
E-mail: Sales@reptonsteel.com.au
David.Smith@ReptonSteel.com.a
Find New Delete Print Save OK Relationships
Repton Steel's - Relationships
Customers Business Contacts Contractors Member of Members Shareholders Shareholders in Suppliers
Filter:
To filter which Customers are shown in the datasheet below, click inside a column and set a filter for it by using 'Records, Filter' on the Menu Bar.
Client Contact Type Account No Customer Category Account Terms:
Craig Conifer Air Conditioning 1003 Normal Payment with Order
Super Dollars - Brisbane, HO Robert Conifer Steel 5678 Normal 20th of following Month
Normal
Display Customer

Well it may look like this as the form displayed on the right will depend upon the form that you last had open on that side – so you can carry on where you left off.

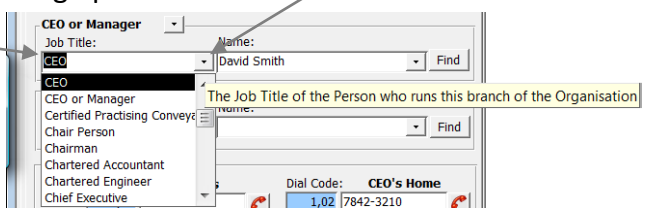
System Conventions

Before we rush into introducing you to the various forms in the system we will cover some of the conventions that apply throughout the system.

Fields with a Blue Background are used to imply that the information they display are not normally required to be input, as the system will work it out for you.

Double-Clicking anyone's Name anywhere in the system will display their record on the left-hand side of the screen.

Combo Boxes like this are used to select from options that may already exist. If you click the **pull-down arrow** on the end of the Box, you will be able to see all the pre-existing options. You can either scroll down and select the required option, or just start typing in the box - if there is a matching option it will 'auto complete' for you. (Combo boxes are not case-sensitive. They work better, in fact, if you always use lower-case.)



You should NOT assume you are restricted to items in the pull-down list, as obviously the system could not possibly be pre-loaded with every possible Job Title of everyone in the World. So this particular Combo Box is pre-loaded with just the Job Titles of everyone who is in the system, as this then makes using existing titles easier.

If you enter the Name of someone who does not exist, you will usually be given the option of creating a new record for them. This is because in GEM you are not just adding text into a box but creating links between records.

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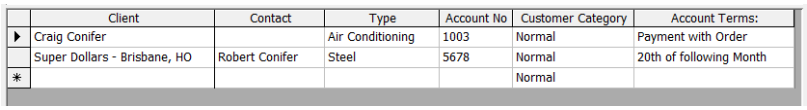
Working with Data Grids like this:

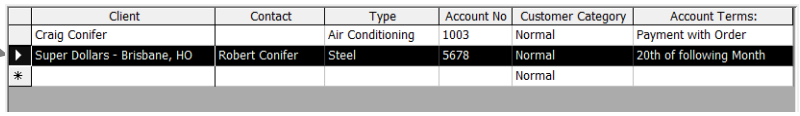


	Client	Contact	Type	Account No	Customer Category	Account Terms:
▶	Craig Conifer		Air Conditioning	1003	Normal	Payment with Order
	Super Dollars - Brisbane, HO	Robert Conifer	Steel	5678	Normal	20th of following Month
*					Normal	

- ▶ Indicates the Current Record
- Indicates a record currently being edited
- * Indicates an 'Empty' Record at the end of the record set

To copy data in a particular column from the row above press the **<crtl>, <shift>** and **<quote>** Keys on your keyboard simultaneously.

To Select a Record click the 'Record Selector' Button at the left-hand end of the Data Grid.



	Client	Contact	Type	Account No	Customer Category	Account Terms:
	Craig Conifer		Air Conditioning	1003	Normal	Payment with Order
▶	Super Dollars - Brisbane, HO	Robert Conifer	Steel	5678	Normal	20th of following Month
*					Normal	

To Delete a Record use the <Delete> Key on the Keyboard. This will delete the currently selected record.

To re-size a column, simply drag the right-hand end of the column heading.

To re-position a column, click the column heading to select the entire column and drag the column heading to the desired location.

To sort on any column right-click in it and then select Sort Ascending or Sort Descending.

The Save Button saves the current record to the database.

The New Button saves the current record if has not already been saved and creates a new blank record for you.

The OK Button saves the current record to the database and creates a new blank record for you. It is the same as using the Save button and then the New button. (So effectively the New and OK Buttons do the same job.)

The Save and OK Buttons

do not normally need to be used, as records will normally be written to the database whenever you move from one Record, Tab or Form to another. Just occasionally you may need to use them, however. This is because the pre-existing options behind Combo Boxes are normally loaded when a Form first opens. So if you have added an option that you want to see in Combo Box after the Form has loaded, you might not be able to find it. In these circumstances you will need to use the Save Button to force a Record to be written to the database and then re-open the Form in question, or use **Records, Refresh** from the Menu Bar to 're-query' the Form.

The Find Buttons are context sensitive. So if you are on the Organisations Tab, the FIND Form will look for an Organisation for you. If you are on the People Tab it will look for a Person for you. If you click the Find button nearest to the Name of the CEO or Manager it will look for someone, already in the system, to become the CEO or Manager. If you use the Find Button nearest to someone's Wife/Partner it will look for someone to become their Wife/Partner and so on.

Double-Clicking Phone Numbers or clicking Buttons alongside them, will dial phone calls for you. (Provided you have a Modem in your machine, and the phone line is connected through a 'Y Splitter' to both your Modem and your phone.)

Double-Clicking Fax Numbers, or clicking Buttons alongside them, will send Faxes for you.

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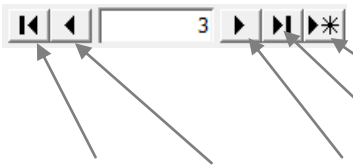
Double-Clicking E-mail Addresses will send E-mails for you.

Double-Clicking a Website Address will open the Website for you.

Navigating Record Sets

Occasionally you will see Forms that have buttons at the bottom that look like this:

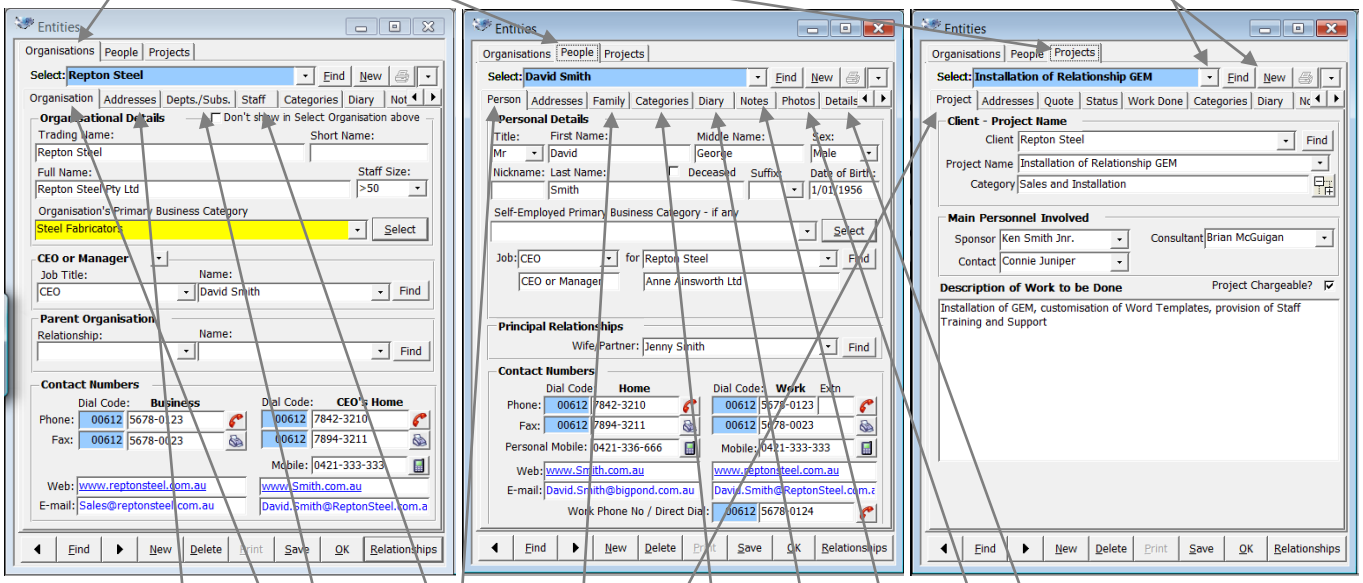


The functions of the useful buttons are:

Go to **FIRST, PREVIOUS, NEXT, LAST, NEW** Record

'Entities' Form

The **'Entities' Form** will always be displayed on the left. This Form enables you to **Select** any of the existing **Organisations, People** or **Projects** that are already in the system, or add a **New** one.



The second row of Tabs changes dynamically dependant upon the 'Entity Type' selected, so that you may enter the appropriate data for an Organisation, Person or Project.

The first Tab for an **Organisation**, **Person** or **Project** always displays; the information that makes an 'Entity Type' different from any other, their principal relationships and main contact details. The remaining **Addresses**, **Depts./Subs.**, **Staff**, **Family**, **Categories**, **Diary**, **Notes**, **Photos**, **Details** Tabs and so on, display the information that is shared between different 'Entity Types'.

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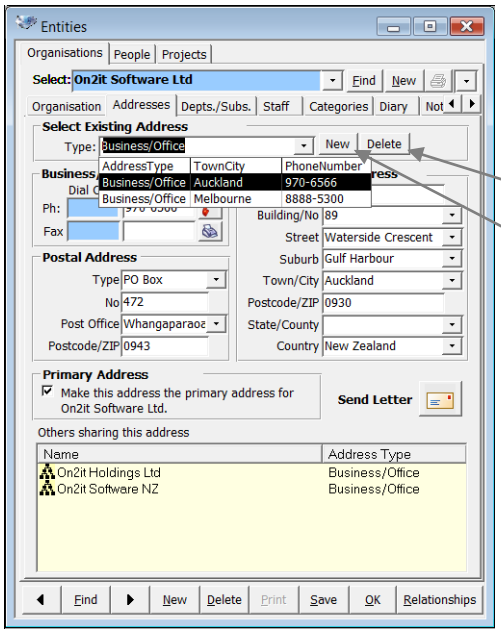
The Address Tab



The Addresses Tab enables you to create as many Addresses of as many Address Types as you like for everyone in the system.

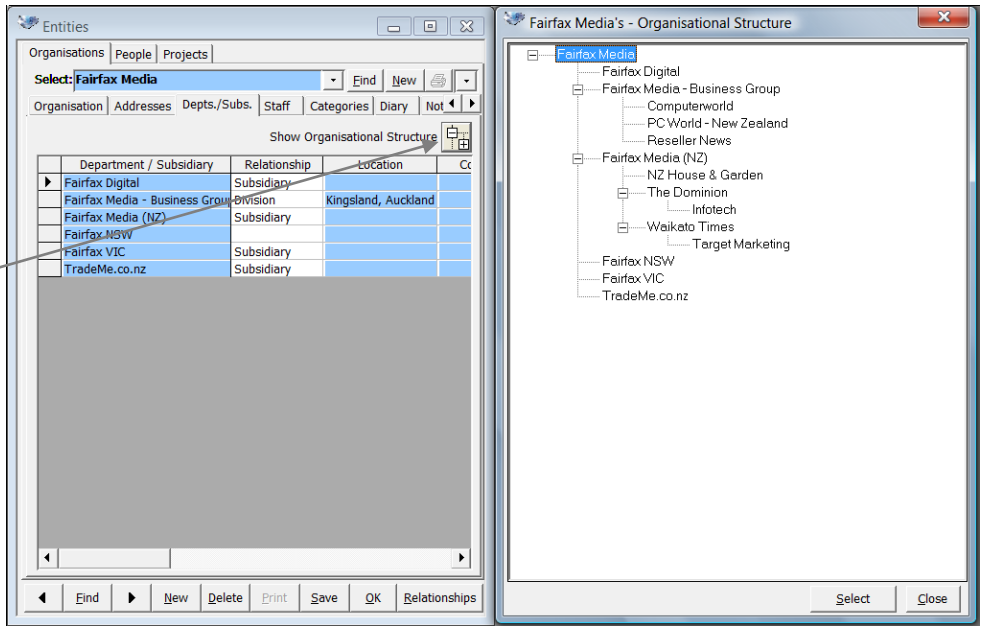
By recognizing an Address from its associated Phone Number the system automatically tracks who else shares the same Address. So if you change the Address for anyone of them, it changes for all of them.

If someone leaves home, you simply **Delete** this Address for them and give them a **New** one.

The Depts./Subs. Tab

This shows the Departments and Subsidiaries of the current Organisation.

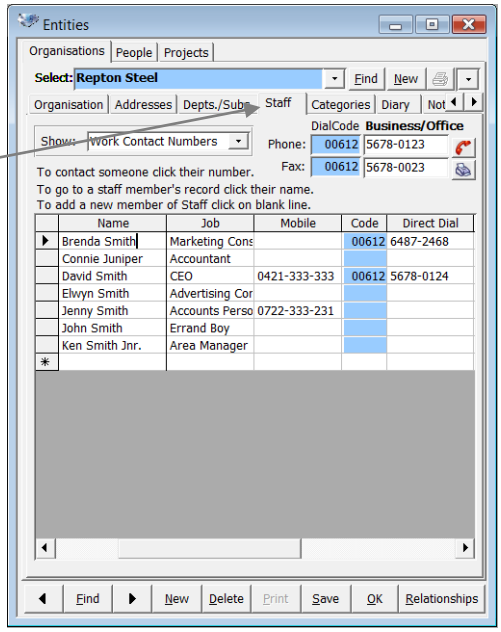
If you click on the **Tree View** button it will show the Organisational Structure for the entire group of which it is a part. The system simply deduces this from the Parent Organisation for each Organisation.



These Tree-View Forms are always 'Modal'. This means the system will wait for you to select what you want, or close the form. If you therefore try to click on any other form the system will just beep at you - nothing else happens.

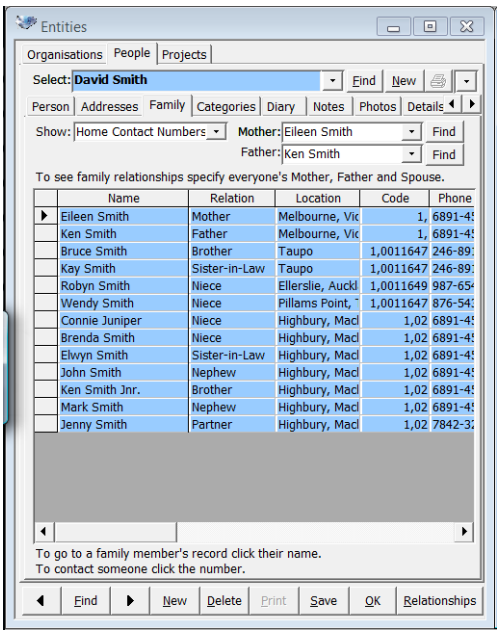
The Staff Tab

This shows the Work and Home contact details for all members of Staff of the current Organisation.


Entities
Organisations People Projects
Select: Repton Steel
Find New
Organisation Addresses Depts./Subs. Staff Categories Diary
Show: Work Contact Numbers
DialCode Business/Office
Phone: 00612 5678-0123
Fax: 00612 5678-0023
To contact someone click their number.
To go to a staff member's record click their name.
To add a new member of Staff click on blank line.
Name Job Mobile Code Direct Dial
Brenda Smith Marketing Cons 00612 6487-2468
Connie Juniper Accountant
David Smith CEO 0421-333-333 00612 5678-0124
Elwyn Smith Advertising Cor
Jenny Smith Accounts Perso 0722-333-231
John Smith Errand Boy
Ken Smith Jnr. Area Manager
Find New Delete Print Save OK Relationships

The Family Tab

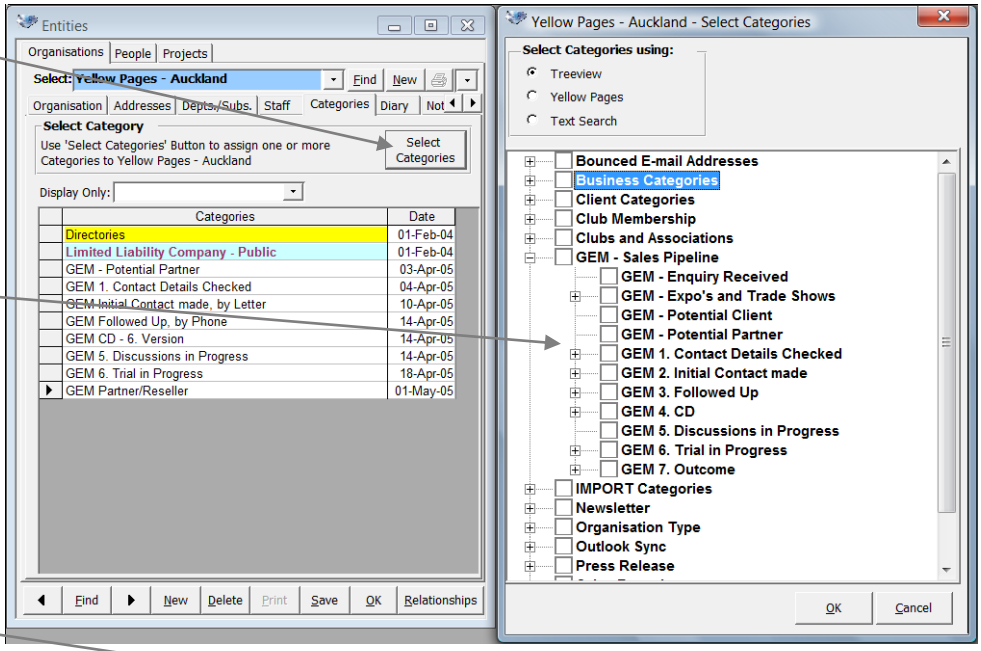
This uses GEM's knowledge of who everyone's Partners and Parents to deduce all their other relatives in the system. You can't add People into this list or edit the data it contains, as the system generates it for you. That's why it has a blue background and no ✳ at the end of the list.


Entities
Organisations People Projects
Select: David Smith
Find New
Person Addresses Family Categories Diary Notes Photos Details
Show: Home Contact Numbers
Mother: Eileen Smith
Father: Ken Smith
Find
To see family relationships specify everyone's Mother, Father and Spouse.
Name Relation Location Code Phone
Eileen Smith Mother Melbourne, Vic 1, 6891-45
Ken Smith Father Melbourne, Vic 1, 6891-45
Bruce Smith Brother Taupo 1,0011647 246-89
Kay Smith Sister-in-Law Taupo 1,0011647 246-89
Robyn Smith Niece Ellerslie, Auckl 1,0011649 987-65
Wendy Smith Niece Pillams Point, 1,0011647 876-54
Connie Juniper Niece Highbury, Macl 1,02 6891-45
Brenda Smith Niece Highbury, Macl 1,02 6891-45
Elwyn Smith Sister-in-Law Highbury, Macl 1,02 6891-45
John Smith Nephew Highbury, Macl 1,02 6891-45
Ken Smith Jnr. Brother Highbury, Macl 1,02 6891-45
Mark Smith Nephew Highbury, Macl 1,02 6891-45
Jenny Smith Partner Highbury, Macl 1,02 7842-3
To go to a family member's record click their name.
To contact someone click the number.
Find New Delete Print Save OK Relationships

The Categories Tab

This can be used to assign as many Categories to anyone or anything in the system, for any purpose you like.

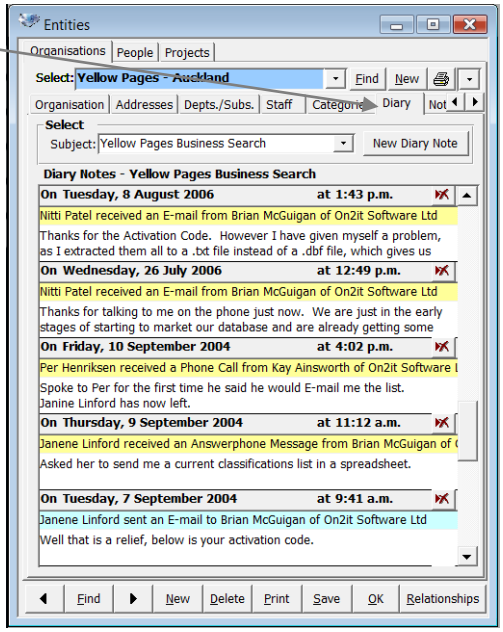
Clicking the **Select Categories** Button will reveal the hierarchical nature of GEM's Categories.



The Select Categories Form will not allow you to do anything else until you have closed the form. It will just beep at you. (It is said to be 'modal' form.)

The Diary Tab

This shows all the 'Diary Notes' about a particular Subject from the point of view of anyone involved. So you can see incoming and outgoing E-mails, Phone Calls, Faxes, letters to and from multiple people all merged into a consolidated history in an unprecedented way – as is illustrated here.


Entities
Organisations People Projects
Select: Yellow Pages - Auckland
Find New
Organisation Addresses Depts./Subs. Staff Categories Diary Not
Select
Subject: Yellow Pages Business Search
New Diary Note
Diary Notes - Yellow Pages Business Search
On Tuesday, 8 August 2006 at 1:43 p.m.
Nitti Patel received an E-mail from Brian McGuigan of On2it Software Ltd
Thanks for the Activation Code. However I have given myself a problem, as I extracted them all to a .txt file instead of a .dbf file, which gives us
On Wednesday, 26 July 2006 at 12:49 p.m.
Nitti Patel received an E-mail from Brian McGuigan of On2it Software Ltd
Thanks for talking to me on the phone just now. We are just in the early stages of starting to market our database and are already getting some
On Friday, 10 September 2004 at 4:02 p.m.
Per Henriksen received a Phone Call from Kay Ainsworth of On2it Software
Spoke to Per for the first time he said he would E-mail me the list.
Janine Linford has now left.
On Thursday, 9 September 2004 at 11:12 a.m.
Janene Linford received an Answerphone Message from Brian McGuigan of
Asked her to send me a current classifications list in a spreadsheet.
On Tuesday, 7 September 2004 at 9:41 a.m.
Janene Linford sent an E-mail to Brian McGuigan of On2it Software Ltd
Well that is a relief, below is your activation code.
Find New Delete Print Save OK Relationships

Notes are listed with the most recent notes at the top.

If you go to an Organisation's Diary Notes you can see the dealings you've had with every member of staff even those that are no-longer there.

If you go to a Person's Diary Notes you can see all the dealings you've had with them – even the ones for previous employers.

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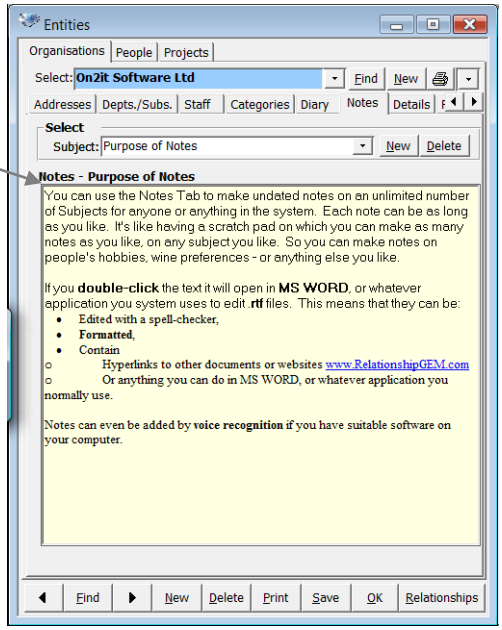
The Notes Tab

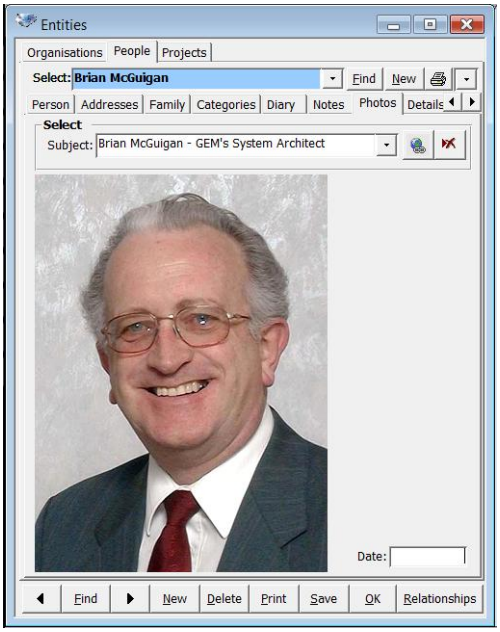
The notes we've made on this particular Tab say it all.


Entities
Organisations People Projects
Select: On2it Software Ltd
Find New
Addresses Depts./Subs. Staff Categories Diary Notes Details
Select
Subject: Purpose of Notes
New Delete
Notes - Purpose of Notes
You can use the Notes Tab to make undated notes on an unlimited number of Subjects for anyone or anything in the system. Each note can be as long as you like. It's like having a scratch pad on which you can make as many notes as you like, on any subject you like. So you can make notes on people's hobbies, wine preferences - or anything else you like.
If you double-click the text it will open in MS WORD, or whatever application you system uses to edit .rtf files. This means that they can be:
Edited with a spell-checker,
Formatted,
Contain
Hyperlinks to other documents or websites www.RelationshipGEM.com
Or anything you can do in MS WORD, or whatever application you normally use.
Notes can even be added by voice recognition if you have suitable software on your computer.
Find New Delete Print Save OK Relationships

The Photos Tab

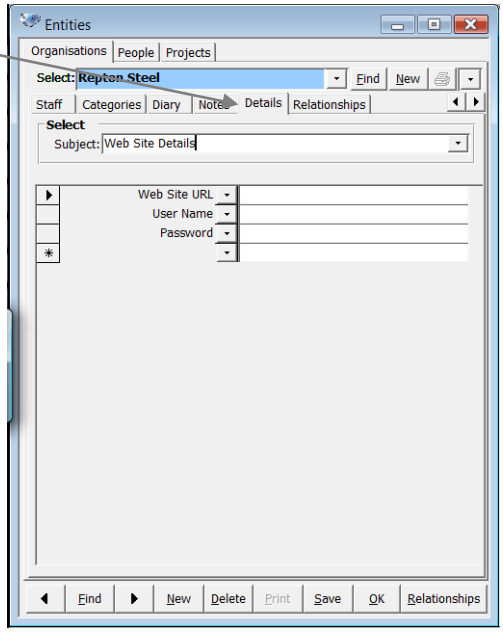
This enables you to store an unlimited number of photos of anyone or anything in the system.

The photos are not actually stored in the database – just a hyperlink to their real location. (This prevents the database getting bloated with objects as large as photos.)



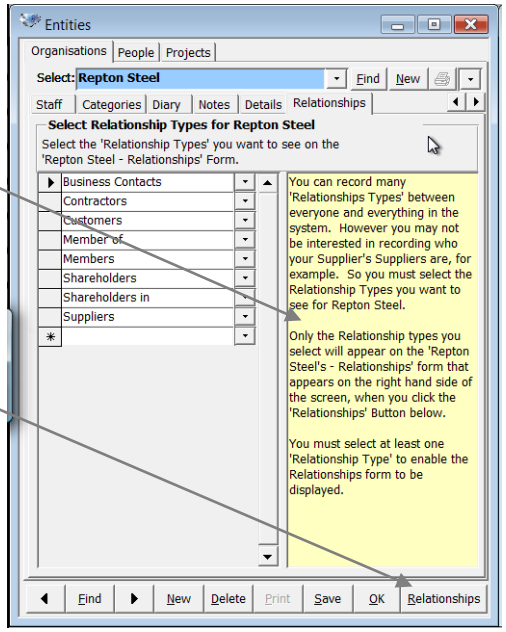
The Details Tab

Enable to input an unlimited number of user defined Fields under an unlimited number of subject headings.



The Relationships Tab

As the **Information Panel** on this Tab explains, this Tab controls which Relationship Types you will see on the 'Relationships' Form on the right-hand side of the screen when you click the **Relationships** Button for the current Entity.


Entities
Organisations People Projects
Select: Repton Steel
Find New
Staff Categories Diary Notes Details Relationships
Select Relationship Types for Repton Steel
Select the 'Relationship Types' you want to see on the 'Repton Steel - Relationships' Form.
Business Contacts
Contractors
Customers
Member of
Members
Shareholders
Shareholders in
Suppliers
You can record many 'Relationships Types' between everyone and everything in the system. However you may not be interested in recording who your Supplier's Suppliers are, for example. So you must select the Relationship Types you want to see for Repton Steel.
Only the Relationship types you select will appear on the 'Repton Steel's - Relationships' form that appears on the right hand side of the screen, when you click the 'Relationships' Button below.
You must select at least one 'Relationship Type' to enable the Relationships form to be displayed.
Find New Delete Print Save OK Relationships

GEM uses 'Information Panels' this wherever a little more explanation is required. Often they are context sensitive and display different information dependent upon which field you are pointing at with your mouse.

'Information Panels' are useful because most people don't like using F1 to bring up on-line HELP, or having to refer to a User Manual. You will see more of these therefore in parts of the system you don't use too often.

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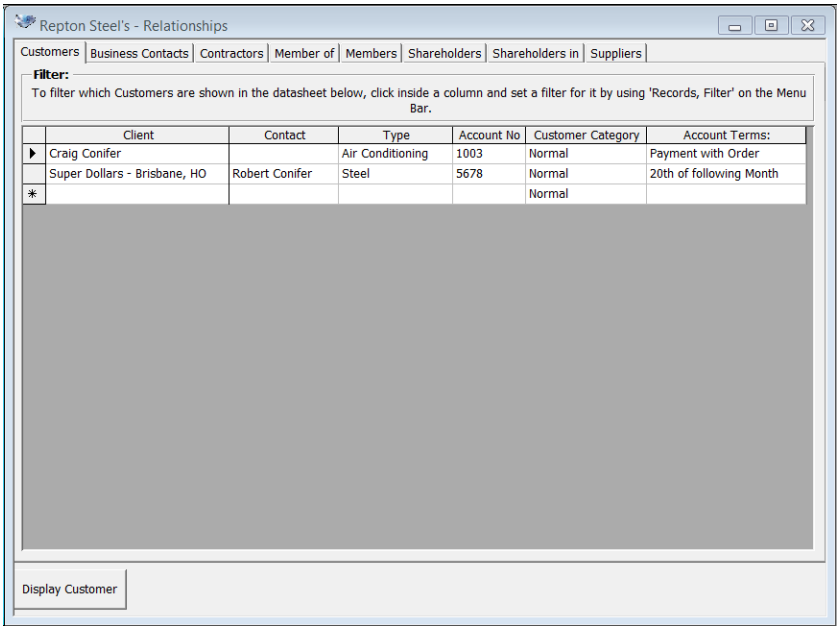
Right-Hand Side Forms

The Forms that may be displayed on the right are:

The Relationships Form

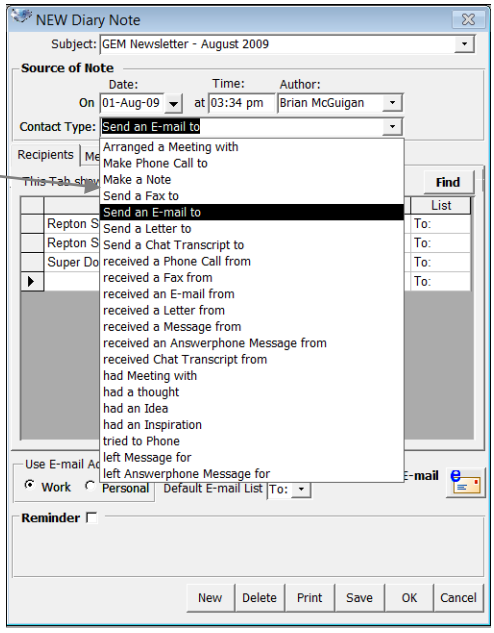
This displays all the Relationships between the 'Entity' on the left and everyone and everything else.

When you create a Relationship between, it always creates both sides. So if you say someone is your Supplier the system will know that you are their Customer. If you say someone is your Uncle, it will know you are their Nephew, if you are male and their niece if you are female.

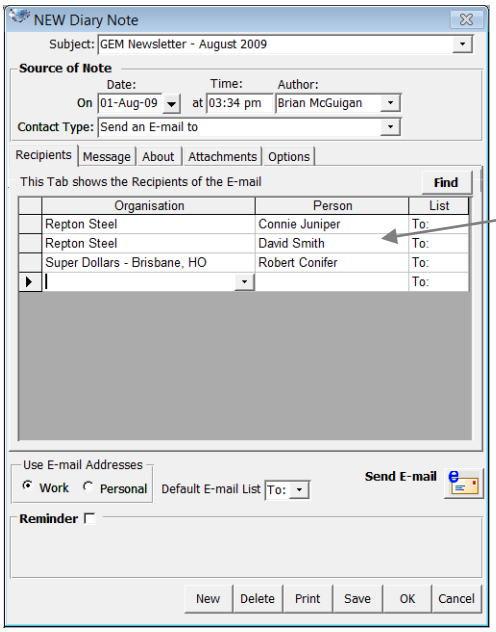


The Diary Note Form

This is used whenever you want to record anything that has a date. Whenever you want to do any of those things illustrated in the pull-down list shown:
(You can even add to the list if you need to.)



GEM uses 'Diary Notes' to originate correspondence and keep track of what has happened in the past. It makes use of MS Outlook's Calendar to make Appointments and plan the future.



Whenever you make a 'Diary Notes' note GEM keeps only one copy, but creates an index for all the Organisations and People involved. This enables you to see all correspondence and notes about phone calls etc., in a single consolidated history from the point of view of anyone involved – even for past employees and previous employers.

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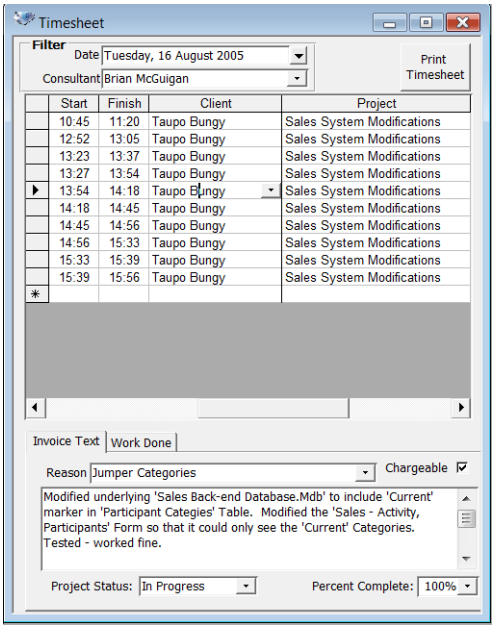
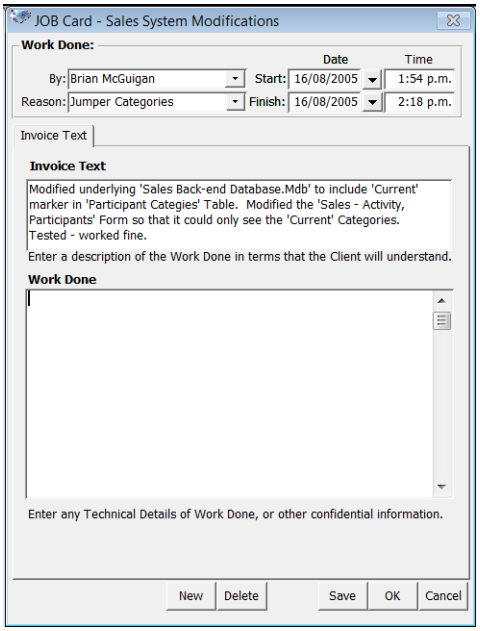
The Timesheet Form

If you regularly keep track of the time you spend working on various Projects, you will see the 'Timesheet' Form displayed on the right. This enables you to track minute by minute how you spend your day and accumulate your hours if you need to charge your clients.


Timesheet
Filter
Date Tuesday, 16 August 2005
Consultant Brian McGuigan
Print Timesheet
Start Finish Client Project
10:45 11:20 Taupo Bungy Sales System Modifications
12:52 13:05 Taupo Bungy Sales System Modifications
13:23 13:37 Taupo Bungy Sales System Modifications
13:27 13:54 Taupo Bungy Sales System Modifications
13:54 14:18 Taupo Bungy Sales System Modifications
14:18 14:45 Taupo Bungy Sales System Modifications
14:45 14:56 Taupo Bungy Sales System Modifications
14:56 15:33 Taupo Bungy Sales System Modifications
15:33 15:39 Taupo Bungy Sales System Modifications
15:39 15:56 Taupo Bungy Sales System Modifications
Invoice Text
Work Done
Reason Jumper Categories
Chargeable
Modified underlying 'Sales Back-end Database.Mdb' to include 'Current' marker in 'Participant Categies' Table. Modified the 'Sales - Activity, Participants' Form so that it could only see the 'Current' Categories. Tested - worked fine.
Project Status: In Progress
Percent Complete: 100%

Another way you can keep track of time you spend working on Projects is through the use of a 'JOB Card'. This too is displayed on the right of the screen, but you are less likely to see it there when the system first opens – as it is less rarely used.


JOB Card - Sales System Modifications
Work Done:
Date Time
By: Brian McGuigan
Start: 16/08/2005 1:54 p.m.
Reason: Jumper Categories
Finish: 16/08/2005 2:18 p.m.
Invoice Text
Invoice Text
Modified underlying 'Sales Back-end Database.Mdb' to include 'Current' marker in 'Participant Categies' Table. Modified the 'Sales - Activity, Participants' Form so that it could only see the 'Current' Categories. Tested - worked fine.
Enter a description of the Work Done in terms that the Client will understand.
Work Done
Enter any Technical Details of Work Done, or other confidential information.
New
Delete
Save
OK
Cancel

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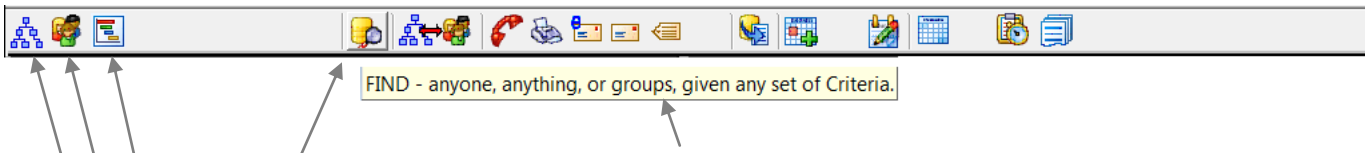
The Toolbar

Much of GEM's remaining functionality can be see by taking a tour through the Toolbar:

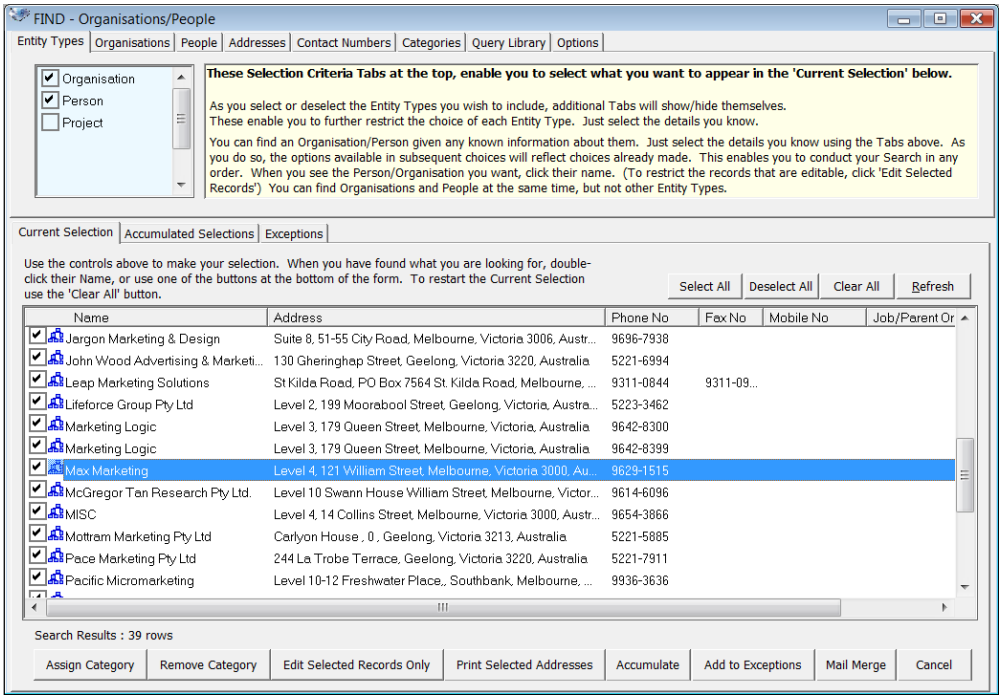


The function of any Button will be revealed by a 'Tool Tip' that appears when the Mouse hovers over a Button.

The first three buttons merely switch 'Entity Type' Tabs on the 'Entities' Form to either :

- **Organisations**,
- **People** or
- **Projects**.

The FIND Form


FIND - Organisations/People
Entity Types
Organisations
People
Addresses
Contact Numbers
Categories
Query Library
Options
Organisation
Person
Project
These Selection Criteria Tabs at the top, enable you to select what you want to appear in the 'Current Selection' below.
As you select or deselect the Entity Types you wish to include, additional Tabs will show/hide themselves.
These enable you to further restrict the choice of each Entity Type. Just select the details you know.
You can find an Organisation/Person given any known information about them. Just select the details you know using the Tabs above. As you do so, the options available in subsequent choices will reflect choices already made. This enables you to conduct your Search in any order. When you see the Person/Organisation you want, click their name. (To restrict the records that are editable, click 'Edit Selected Records') You can find Organisations and People at the same time, but not other Entity Types.
Current Selection
Accumulated Selections
Exceptions
Use the controls above to make your selection. When you have found what you are looking for, double-click their Name, or use one of the buttons at the bottom of the form. To restart the Current Selection use the 'Clear All' button.
Select All
Deselect All
Clear All
Refresh
Name
Address
Phone No
Fax No
Mobile No
Job/Parent Or
Jargon Marketing & Design
Suite 8, 51-55 City Road, Melbourne, Victoria 3006, Austr...
9696-7938
John Wood Advertising & Marketi...
130 Gheringhap Street, Geelong, Victoria 3220, Australia
5221-6994
Leap Marketing Solutions
St Kilda Road, PO Box 7564 St. Kilda Road, Melbourne, ...
9311-0844
9311-09...
Lifeforce Group Pty Ltd
Level 2, 199 Moorabool Street, Geelong, Victoria, Austra...
5223-3462
Marketing Logic
Level 3, 179 Queen Street, Melbourne, Victoria, Australia
9642-8300
Marketing Logic
Level 3, 179 Queen Street, Melbourne, Victoria, Australia
9642-8399
Max Marketing
Level 4, 121 William Street, Melbourne, Victoria 3000, Au...
9629-1515
McGregor Tan Research Pty Ltd.
Level 10 Swann House William Street, Melbourne, Victor...
9614-6096
MISC
Level 4, 14 Collins Street, Melbourne, Victoria 3000, Austr...
9654-3866
Mottram Marketing Pty Ltd
Carlyon House , 0 , Geelong, Victoria 3213, Australia
5221-5885
Pace Marketing Pty Ltd
244 La Trobe Terrace, Geelong, Victoria 3220, Australia
5221-7911
Pacific Micromarketing
Level 10-12 Freshwater Place,, Southbank, Melbourne, ...
9936-3636
Search Results : 39 rows
Assign Category
Remove Category
Edit Selected Records Only
Print Selected Addresses
Accumulate
Add to Exceptions
Mail Merge
Cancel

The next button displays the 'FIND' Form that enables you to find anyone, anything, or groups, given any set of criteria – as the 'Tool Tip' suggests.

This Form crops up in many guises throughout the system, whenever you want to find anything or select groups to do a mail-merge. Because of the multi-functional nature of this form, once you've learnt to use it once, you can apply your knowledge throughout the system.

Like Microsoft's 'Ribbon' in Office 2007, the Tabs at the top of the form, customise themselves according to what you are looking for, as does the message in the Title Bar at the top of the form and the buttons along the bottom.

It also has 'Information Panels' that explain how each part of the Form works – to save you wondering and having to hit F1 too often.

If you are using the FIND Form to find just a single option; say an Organisation's parent company or someone's Wife, then the FIND Form will behave 'Modally'. This means you will ether HAVE to find what you are looking for, or close the form. If you try to do anything else, the system just beeps at you until you close the form.

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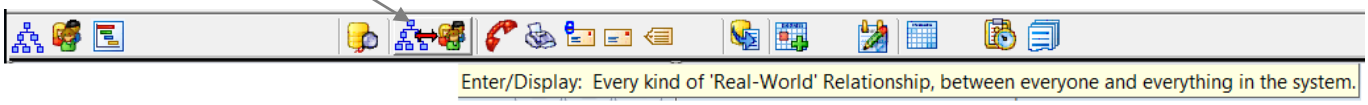
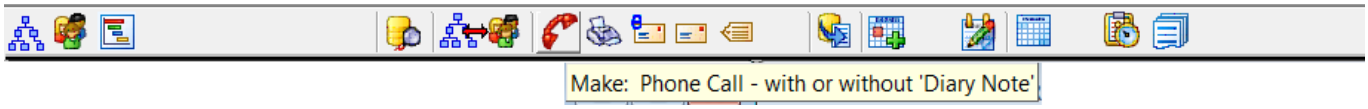
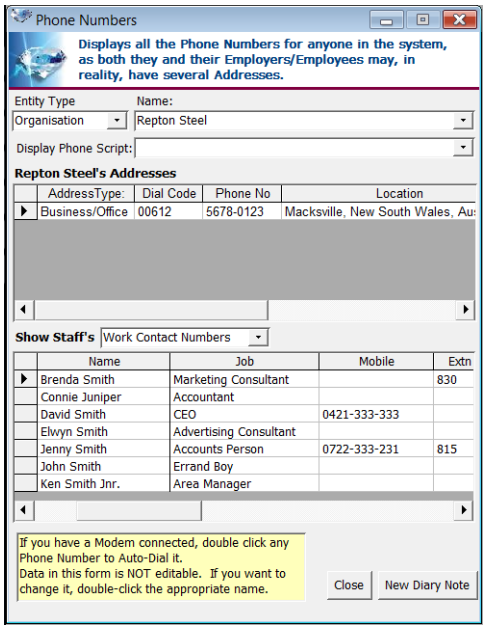
The Relationships Button on the Toolbar



Displays the 'Relationships' Form on the right that we've seen earlier.

The Make Phone Call Button



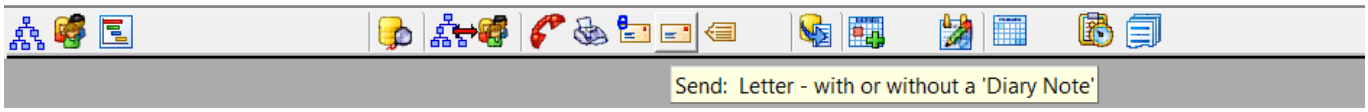

Phone Numbers
Displays all the Phone Numbers for anyone in the system, as both they and their Employers/Employees may, in reality, have several Addresses.
Entity Type
Organisation
Name:
Repton Steel
Display Phone Script:
Repton Steel's Addresses
AddressType: Dial Code Phone No Location
Business/Office 00612 5678-0123 Macksville, New South Wales, Au
Show Staff's
Work Contact Numbers
Name Job Mobile Extn
Brenda Smith Marketing Consultant 830
Connie Juniper Accountant
David Smith CEO 0421-333-333
Elwyn Smith Advertising Consultant
Jenny Smith Accounts Person 0722-333-231 815
John Smith Errand Boy
Ken Smith Jnr. Area Manager
If you have a Modem connected, double click any Phone Number to Auto-Dial it.
Data in this form is NOT editable. If you want to change it, double-click the appropriate name.
Close
New Diary Note

This displays the 'Phone Numbers' Form on the left of the screen.

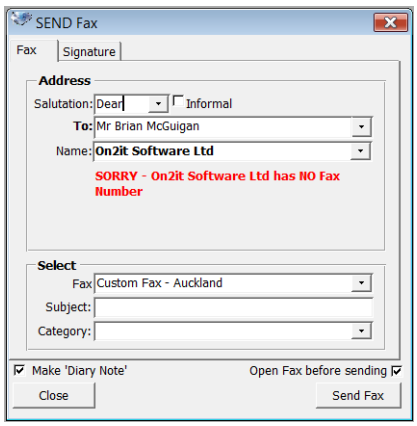
As the Form says, it displays all the Phone Numbers for anyone in the system as both they and their Employers/Employees may, in reality, have several Addresses.

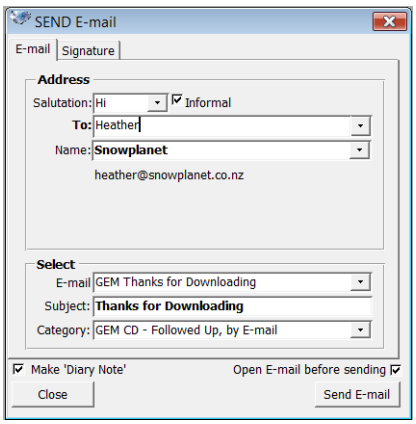
This form is also displayed if you open the 'Diary Note' Form and choose to 'Make a Phone Call'.

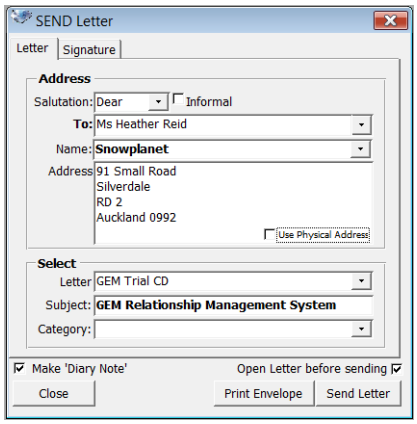
The Send Fax, Send E-mail and Send Letters Buttons



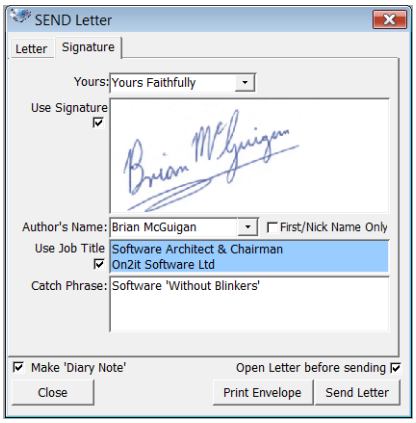
These three Buttons all display very similar Forms:







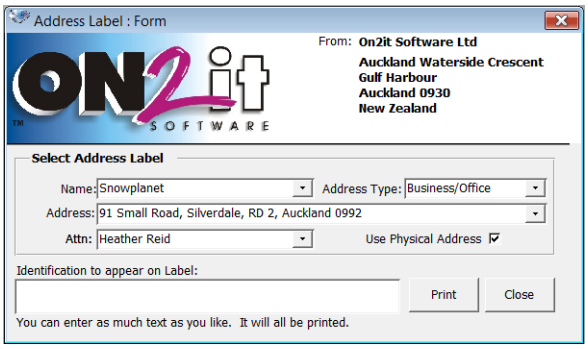
They are actually the same Form that simply displays a different Title. They are also displayed however you choose to initiate your correspondence. You can start from the Toolbar, a Diary Note or a Mail-Merge. It does not matter how you start, they all end up here so that you can choose which Template you want to use, and how you wish to address and sign your correspondence.



The Signature Tab is the same for all of them. It even enables you to add a password protected signature, if you wish.

The Print Label Button

Displays the 'Address Label' Form, which is handy for printing parcel labels and so on.



The MAIL-MERGE Button

This displays the FIND Form that we saw earlier.

The ADD Appointment Button

This displays the 'Diary Note' Form preconfigured to create an Appointment in MS Outlook. The advantage of doing this way, rather than doing in Outlook, is that GEM automatically adds the Address of who the Appointment is with.

The Make 'Diary Note' Button

This displays the 'Diary Note' Form that we saw earlier.

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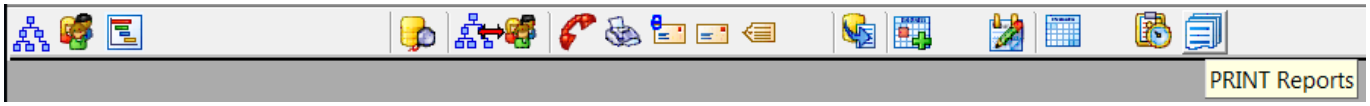
The View Calendar Button

Opens your Calendar in MS Outlook.

The Timesheet Button

Displays the Timesheet Form we saw earlier.

The Print Reports Button



Displays the Projects Reports Form, which enables to select which Project Report you want to print.